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ABSTRACT

This handbook, developed by the National Alliance of Business, is designed as a tool for Private Industry Councils (PICs) in promoting permanent partnerships between public and private interests in training and employing the disadvantaged. Basic information on roles, organizational issues, and program activities of the PIC are considered in four sections. All sections begin with an introduction that provides background development information and closes with suggested strategies. The organizational objectives, roles, and relationships of PICs are discussed in section 1 so as to encourage experimentation in the private sector and to promote changes within the existing employment training system. Section 2 highlights the planning, management, and evaluation (PME) process; discusses the usefulness and benefits to be derived from implementation of the process; and suggests how the PME process can contribute to the success of the PIC. The advantages and disadvantages of classroom training, on-the-job training, customized training, upgrading and retraining, pre-employment and job search, and youth and other targeted programs are discussed in the next section. The final section defines Employment Generating Services (EGS) in terms of marketing activities, labor market information, economic development linkages, and other supportive services. Appendixes include the National Alliance of Business's areas of expertise and services upon which a PIC can draw (contact persons and addresses provided), a 36-item reference, and a glossary. (BPB)

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National Alliance of Business

Private Industry Council Training Series

Options On Roles, Organization, and Programs of the Private Industry Council

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Options on Roles, Organization, and Programs of the Private Industry Council

Private Industry Council Training Series
produced by
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Copies of this handbook may be obtained from the National Alliance of Business Regional Service Office in your area (see listing on page 56).

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Foreword

The private sector—now more than ever—is being called upon to work closely with government to help solve the employment and training problems of our nation. Private Industry Councils are in a unique position to make it possible for thousands of business leaders to get involved in shaping local employment and training programs to better meet private sector needs.

The role of the Private Industry Council in its local community and its approach to accomplishing its mission should be of primary concern to the business and other community volunteers who comprise the membership of Private Industry Councils.

Private Industry Council membership must be active and involved in existing local decision-making processes that impact on the role of the PIC. This type of active involvement will ensure that Private Industry Councils are structured and organized to meet their objectives in the context of the local political, economic, and social environment. This handbook addresses these needs.

William H. Kolberg
President

Introduction

This handbook provides condensed, basic information on roles, organizational issues, and program activities that influence the effectiveness of the Private Industry Council. It is offered as a tool to assist the PIC with decisions on these issues.

The information has been drawn from selected records of PIC experiences to date, informed opinions of practitioners, and sound managerial practices.

The theme of the handbook is that PIC effectiveness must be defined and measured within the context of the PIC's chosen role and its stated goals and objectives.

PIC chairpersons, members, and staff should find the information useful as a "primer" on organizational and programmatic options. The handbook provides "food for thought" as planning for the new fiscal year proceeds. The PIC planning cycle is an appropriate time for you to analyze where you've been, where you are now, and what changes, if any, are necessary to help your PIC more clearly define its role and bolster its ability to carry out that role.

Should you need more detailed "how to" information you can draw upon the expertise of the National Alliance of Business regional staff identified in Appendix I or you may secure the documents identified in Appendix II or cited in Appendix III.

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Section 1

Organizational Roles and Relationships of the Private Industry Council

Introduction

The very complex and diverse CETA system has been assaulted by conflicting demands which have skewed its original legislative intent. The Private Sector Initiative Program represents a significant attempt to redirect the CETA system towards its original purpose by creating closer and more effective public private partnerships to foster employment of disadvantaged persons. The Private Sector Initiative Program should not be viewed as "just another CETA program". It is a special program with special purposes: to encourage experimentation in the private sector and to promote changes within the existing employment and training system. The Private Industry Council represents a direct response to fulfill the need for communities to organize themselves and set priorities to meet local conditions. It is in this context that the PIC must make the critical decisions which are discussed in this section.

The ultimate role of the Private Industry Council is to become the leader in creating a *genuine* and *permanent* partnership between public and private interests in training and employing the disadvantaged. To do this, the Private Industry Council must build a firm institutional base and strengthen its organizational capacity. The Private Sector Initiative Program provides to the PIC flexibility in defining its roles and responsibilities and in organizing and managing its structure.

This section presents a wide range of options related to PIC roles and responsibilities, addresses the organization and composition of the PIC structure, discusses the effectiveness of a PIC, highlights the importance of interorganizational relationships and linkages, and provides suggestions to assist the PIC in strengthening its overall capabilities.

Section 1
Part A

PIC Roles and Responsibilities

What Are The Basic Responsibilities of the Private Industry Council?

The PIC's most basic responsibility is to design and develop Title VII programs. Inherent in this responsibility are various subordinate responsibilities the PIC must also assume. These responsibilities cover a range from (1) those *required* by law to (2) those the PIC *should assume* to (3) those the PIC *may choose* to assume. This handbook addresses these responsibilities in varying degrees of depth throughout its content under topics such as goals; roles; structural arrangements; organizational relationships; planning, management and evaluation; and program and activity options.

Basic responsibilities are highlighted below and they can be used by the PIC as a base for its decision-making. The extent to which these responsibilities are assumed by the PIC may determine how well the PIC's programs work and how great the PIC's impact upon the employment and training system will be.

Responsibilities Mandated by Legislation

- Preparation of a plan for the conduct of Title VII activities and programs in conjunction with the prime sponsor
- Full participation in the formulation and development of the prime sponsor's plan for conduct of all other CETA programs
- Participation in and implementation of activities authorized under PSIP in cooperation with the prime sponsor.

Other Basic Responsibilities

- Set priorities to meet local business conditions
- Organize and structure the PIC for maximum impact
- Provide genuine decision-making authority as representatives of the private sector
- Promote development of specialized labor market information upon which the PIC may make productive decisions and well-conceived plans
- Offer large and small businesses opportunities for leadership in PIC policy and programs
- Sustain continuous private sector-oriented decision-making and program support activity for private sector initiatives
- Establish cooperative relationships with the local CETA Director and staff and stimulate comprehensive planning with maximum responsiveness to private sector needs
- Utilize a structured and effective planning, management, and evaluation process and to include the actors and institutions whose support is important, especially the CETA Planning Council and local CETA Director and staff.

What is The Mission of The Private Industry Council?

The *basic mission* of the PIC as vested in Title VII of CETA is:

- To increase the involvement of the business community in employment and training activities
- To increase private sector employment opportunities for the economically disadvantaged.

To achieve this mission, the Private Industry Council must have clearly defined goals and appropriate, related roles and responsibilities. In addition, it must organize for maximum impact.

What Are The Private Industry Council's Goals?

The Private Industry Council should set its goals based upon (1) the legislative intent of Title VII and (2) local business conditions. Goals should be clear, widely understood, and shared by PIC membership.

The PIC may increase its effectiveness by following these *principles* related to goals:

- Vague goals should be clarified and specific PIC roles and activities should be related to each goal.
- Goals may need to be changed over time as local conditions change.
- Goals should be communicated clearly to both the public and private sector.
- Goals should be widely accepted.

Among PICs, goals will vary according to local conditions. Some *examples of goals* which a PIC can set are:

- *Movement* of the economically disadvantaged into productive private sector employment
- *Redirection* of the focus of local employment and training programs from public employment to permanent, unsubsidized private sector employment
- *Integration* of employment and training programs with related initiatives (such as economic and community development) and with private sector needs
- *Creation* of partnerships between the public and private sector and to nurture and sustain the relationships between employment and training programs, related others, and the private sector
- *Stimulation* of *new* and *different* business participation in local employment and training efforts to open up industries and occupations once closed to the disadvantaged
- *Expansion* of impact on initiatives outside of the Title VII program area
- *Strengthening* of the local economy.

The PIC must decide on the mix of goals it desires and its priority for each goal. Such decisions form the base of the PIC's *strategic plan* which gives scope and direction to its activities. The types of roles the PIC will fulfill and how these roles will be defined and implemented are developed from the set of goals selected and the PIC's strategic plan. (See NAB's *Planning, Management and Evaluation: Realizing PIC Potential* for specific information on how to translate broad goals and directions into specific program objectives and projects.)

What Are The Roles of The Private Industry Council?

The type and extent of PIC involvement in the employment and training system is a major ongoing issue facing Private Industry Councils. For PICs, "involvement" may include a variety of roles ranging from the effective use of Title VII resources to influence over the use of CETA resources in other Titles to extension of its influence beyond the CETA system. PICs in different communities will determine different ways and means to become involved. To become effectively involved in the employment and training system, the PIC must first clearly define its role.

The *role options* open to the PIC fall into three basic *categories*:

- Advisor/Planner

  As advisor/planner, the PIC may counsel, consult, and inform on all aspects of the local employment and training system; identify problems and recommend solutions; review existing programs; pinpoint new opportunities for private sector programs; input significantly in the planning process.

  All Private Industry Councils are required to participate in planning (see "Responsibilities Mandated by Legislation", page 2 in this section and Section 2).

- Broker

  As broker, the PIC sells PSIP, Private Industry Councils, and CETA programs; supports programs and initiatives; negotiates with representatives from government, business, and the community; facilitates connections between public and private interests and needs; provides technical assistance to industry; opens doors previously closed to CETA.

- Program Operator

  As program operator, the Private Industry Council actually designs, administers and operates programs, either through contracts or directly.

The PIC may select any combination of these roles identified above. No one set of roles is inherently superior to another. The PIC must decide on the extent to which it desires to become involved, the direction it wishes to take, and the best mix of roles to accomplish this.

To What Extent Should A PIC Become Involved In The Employment and Training System?

The PIC has the basic options of assuming:

- a pro-active, initiating role, or
- a reactive role in which it ratifies what is presented to it.

Thus, the PIC must decide on whether it will serve merely as an advisor or whether it will extend its involvement to brokering and perhaps administering programs. None of the options of (1) advisor-only or (2) broker, or (3) program operator is inherently superior to the others. Each PIC should choose *what will work best in its community*.

Some PICs have chosen the advisor-only role because they feel that the operational expertise is held by the prime sponsor and should remain there, or that an additional subcontractor is not needed. Other PICs emphasize other strategies such as marketing and economic development. Still others seek to participate in actual program operations for a variety of reasons, including the legislative intent of Title VII to test and demonstrate the effectiveness of a variety of programs. Many PICs have chosen to carry out roles in all three categories described above.

In whatever role it assumes, the PIC's job is to *represent the private sector*. It must choose the most effective set of roles to accomplish this job in the context of its local business environment.

To determine the type and extent of its involvement, the PIC should consider such local environmental factors as

- the limitations of available resources to implement its roles
- the "perceived" health of the local CETA system

  Good health promotes a good public image. Poor health may create difficulties in getting programs started. On the other hand, poor health may indicate the need for more extensive involvement.
- local economic conditions and their effect on the PIC's role (Poor economic conditions may lead to PIC activity in areas such as economic and community development.)
- current strength and productiveness of private sector ties
- local political conditions and their effect on the PIC's role
- nature of CETA-PIC staff relations (Cooperative relations help ensure success.)
- multi-jurisdictional status of the PIC (A variety of roles may be more difficult to carry out in multi-jurisdictional areas.)
- nature of PIC staff (PICs with full-time, independent staffs are often able to undertake more extensive activities.)

Charts on the following pages present role and activity options for the PIC to consider during its decision-making processes.

PIC Role Options

The following roles are presented for consideration by a PIC after it has made decisions on its direction and extent of involvement. The Private Industry Council should select roles which will provide for: (1) *maximum presentation of the private sector needs and view* and (2) *maximum impact of the PIC.*

- To serve as the independent *voice for business* in CETA
- To serve as a *promoter* of private sector views and encourage new responsiveness to industrys' needs
- To serve as the *contact* in the employment and training network through which businesses may increase their responsibilities and direct their actions
- To act as *publicist* to increase private sector visibility and positive reception
- To serve as a *facilitator* to encourage leading businesspersons and major corporations to move out front as leaders
- To act as *advisor* to the employment and training system and provide direction which will increase private sector job placements
- To serve as an active *solicitor* of public and private support for participation in PSIP programs
- To serve as an *educator* and *technical advisor* to private employers so that they may fully understand and utilize Title VII programs
- To act as *strategists* in developing methods and means to enhance the public/private partnership.
- To serve as a *catalyst* in focusing attention and action to the demand (job creation) side of the labor market
- To act as a *change agent* by positively affecting employers' attitudes toward PSIP programs and toward CETA clients
- To serve as an *advocate* in encouraging labor unions and other community based organizations to move into more positive participation through the PIC
- To act as "*ombudsman*" in the area of contracting and procurement
- To serve as a *coordinator* in program development and administration
- To serve as a *program administrator* and *operator.*

PIC Activity Options

Certain activities flow from the roles the PIC has selected. The Private Industry Council can select from a variety of activity options:

- Actively develop programs
- Determine training possibilities
- Encourage utilization of available tax credits
- Define labor needs so that concrete programs can be responsive to them
- Assist educational institutions in finding new ways of helping students meet the requirements of the local labor market
- Identify the unemployed needed by the private sector
- Train the unemployed
- Place the unemployed in unsubsidized private employment
- Provide technical assistance to the local employment and training system to show how business needs may be met
- Provide technical assistance to employers on:
  - —how CETA can assist them
  - —how to reduce administrative burdens and red tape
- Develop specialized labor market information.

Should the PIC Leap into Implementation?

Some PICs will implement their roles and programs faster than others. The PIC must make choices on the speed with which it desires to implement. These choices should be based upon strategic thinking and calculated decision making.

The PIC has *two basic options* in deciding how fast it wants to move ahead:

- Implementing rapidly using focused goals
- Implementing slower using broader goals.

Neither option is a "best" choice—for example, fast may not be best. The choice of one option over the other should be determined by local conditions for success and the preference of the PIC. Community support is critical to program success. The program support needed by the PIC may be strong enough initially to accommodate more rapid implementation or additional support may need to be developed prior to actual implementation.

No "one best" point in time for implementation has been identified. However, findings from studies of PICs do suggest general trends and advantages and disadvantages of rapid or slower implementation. The *findings* are presented below and can be weighed when the PIC makes decisions on implementation.*

Rapid Implementation

PICs that have chosen the "fast" option have focused their goals, know the direction in which they want to move, and are functioning relatively smoothly. As its major advantage, rapid implementation means the PIC can serve clients quickly and actively. But success may be limited because the program may lack political backing, may be inappropriate to the locality, or not well conceived or designed.

Slower Implementation

PICs that have chosen the "slower" option have broader goals which include a preference for implementing something new and different. These PICs are making a more deliberate start in determining the direction in which to move, and are involved in deciding how to get there. The major advantages in implementing slower are that (1) programs *may* result in greater impact in the long run, and (2) programming *may* be more innovative.

The PIC should consider additional *factors* when making choices on the timing of implementation:

- independence/integration of PIC/CETA staff
- desired level of "external activism" in the community and desired linkages
- type and extent of involvement desired (advisory versus program operation)
- degree of interest in innovation.

*Findings identified in a study by Ohio State University, 1980.

Section 1
Part B

PIC Organizational Structure and Relationships

PICs are vested with varying degrees of development potential. The PIC should *organize and manage itself for maximum effectiveness in the local community.* To do this, the PIC may need to devote a significant amount of time, effort, and resources to developing and strengthening its institutional base and its organizational capacity to carry out its roles and operations. As a first step, the PIC should look at each element of its internal structure and make improvements as needed. Then the PIC should develop its interorganizational relationships to the fullest extent possible.

What Are The Basic Elements of the PIC's Internal Structure?

In developing its structure and organizing itself, the goal of the PIC should be genuine input from the private sector—input that will be followed by placement of the unemployed in the private sector. The PIC should organize its internal structure to

- provide a forum for the exchange of ideas, policies, and perspectives among a wide range of divergent groups, community organizations, and institutions
- create at the local level a permanent institution that business can trust
- provide a point of contact for the private sector where their problems may be understood, articulated, and addressed
- offer an opportunity for large and small businesses to exert their leadership and influence through PIC policy and programs
- "speak the language" of the private sector
- allow it to adapt to suit circumstances in the local business, political, and social environment.

Title VII allows for flexibility in the organizational structure of the PIC. Different PICs structure themselves in different ways according to different local needs and conditions. No one particular structure is necessarily more successful than others. A PIC may need to restructure or reorganize itself periodically to increase its effectiveness.

Although the internal organization varies from PIC to PIC, *basic structural elements* common to all PICs need to be considered including:

- Organizational Status
- Membership Selection Process
- Size and Composition of the Council
- Governing Rules and Bylaws
- Committee Structure
- PIC Staff

Is There A Preferred Organizational Status For A PIC?

The organizational status of the PIC is related to its level of autonomy and its desire for incorporation. Title VII provides substantial leaway for the PIC to determine the nature of its organizational status.

The *options* available to the PIC in deciding upon its *organizational status* are:

- Incorporation as a private, non-profit corporation with a high degree of autonomy from both the prime sponsor and other CETA Council operations
- Organization as a division within the CETA prime sponsor governance with a low to moderate level of autonomy, depending on local relationships and staffing.

One option is not inherently superior to the other. A PIC may be quite effective without being incorporated and without having an independent, full-time professional staff. In addition, the PIC's level of autonomy will not necessarily insure success or lead toward failure. A PIC may operate with a very high level of autonomy and still retain the cooperative relationships with the CETA Director and staff that are so vital to its effectiveness. To be most effective, the PIC's decision on organizational status should be directly related to its assessment of what will work best in the local environment.

Although no one particular organizational status can be said to be "right" for all PICs, studies of incorporated PICs have revealed some general impressions and characteristics a PIC may wish to consider in its decision making.

The Incorporated PIC:

- Can enter into contracts to provide services and operate programs freely
- Can receive cash contributions and grants from businesses and foundations
- Can employ its own professional staff, hire staff rapidly, and pay them relatively well
- May gain the partial separation from the CETA system which it may desire for increased visibility and identification as a private sector organization
- *May* experience greater strength and program success, depending upon local conditions
- *May* experience restrictions on the ability to draw upon the administrative resources of the CETA prime sponsor and local staff—resources particularly needed by small PICs
- *May* find the high level of autonomy counter productive or inhibitive to the desired PIC/CETA cooperative relationship which is a major ingredient of success
- *May* place limitations on its potential to impact on programs other than Title VII.

The trade-offs inherent in decisions to incorporate or not to incorporate should be weighed carefully by each PIC. When deciding upon the level of autonomy it needs, the PIC should ask the following questions:

- What will the impact be on PIC role and program activities?
- What will the impact be on overall CETA programing?
- What will the impact be on the ability of the PIC to represent and foster private sector involvement?
- What will the impact be on the PIC staffing arrangements?
- What will the impact be on the PIC-Prime Sponsor relationship?
- How does the business community perceive CETA?
- Does the PIC want to be strictly an advisory body or does it want to operate programs?
- What are the personal and legal responsibilities of members of the incorporated PIC?

The level of autonomy a PIC seeks and the decision to incorporate or not incorporate should be worked out by each PIC in the context of local community relationships. It is important for the PIC to focus on the *manner* in which these decisions are made and

articulated. The PIC should avoid generating negative feelings which could seriously threaten the PIC's effectiveness.

PIC Member Liability
PIC member liability is a complex issue that is often overlooked. Although the prime sponsor is ultimately accountable for activities conducted and funds expended under Title VII (CFR Sec. 679.3-8), this accountability does not insulate the members of a PIC that is contractor or subgrantee of the prime sponsor from liability.

Membership on any board opens an individual to liability from actions taken and increases exposures to liabilities. These exposures are somewhat diminished when the PIC members function in an advisor-only role to the prime sponsor; however, the exposure is not necessarily removed completely.

Incorporation provides PIC members with some insulation from personal liability for damages arising out of PIC activities. Liability insurance for PIC members is available through NAB to cover members' defense costs and awards to injured parties. Under actual circumstances, coverage is determined by the insurance company through a claim made on the insured PIC. A PIC should coordinate incorporation and insurance coverage with the prime sponsor and a locally retained attorney.

How are PIC Members Selected?

The Title VII legislation provides that as a PIC is being established, the Chief Elected Official will appoint a chairperson and members. Once the PIC is established, a chairperson from business and industry is selected by members of the PIC. The Chief Elected Official is also responsible for replacing members.

Membership selection, renewal, or replacement should be a cooperative process between the PIC and the Chief Elected Official. The PIC should first identify its specific needs for expertise, stature and support in the community, and types of representation and perspectives desired. The PIC should then take the lead in identifying and proposing prospective members to meet these needs.

To operate effectively, the PIC needs a replacement process that is timely, efficient, and easy to use. A PIC may also wish to take the lead in developing such a process, if needed. The PIC that establishes and maintains continuing, open communications with the Chief Elected Official regarding the composition of its membership is more likely to obtain and keep active, effective members.

What is the "Ideal" Size of the PIC Membership?

There is no "ideal" size for a PIC. Joseph Weber, in *Managing the Board of Directors*, suggests that board size should range from 30 to 36. PIC membership should be large enough to be truly representative of the private sector and include representation from other groups as mandated by the Title VII legislation. An extremely large PIC membership is unwieldy and creates complex organizational problems. However, size limitations may restrict participation in undesirable ways—it may limit the PIC's usefulness as a forum for interested but divergent groups.

Who Should Comprise the Membership of the PIC?

The composition of the PIC's membership is critical to its success. The PIC may

significantly enhance its organizational capacity to impact by (1) getting *motivated* private sector leaders to serve as members, and by (2) keeping this membership *active*.

Title VII legislation requires that 51% of the PIC membership come from business. The PIC that believes that "Business speaks better to business" may wish to increase its representation of the private sector's needs and concerns by pushing for an even greater private sector membership.

Title VII legislation also addresses the participation of small and minority businesses as well as members representing labor unions, community based organizations, educational institutions, and economic development councils.

Business participation may be especially useful in increasing the PIC's effectiveness by providing

- business' acceptance of responsibility for employment and training
- accurate and timely input on labor market conditions
- feedback on PIC operations and initiatives
- expertise in shaping training curricula
- a private sector tone and framework upon which a factual, data-oriented decision-making process may be based.

The PIC should aim towards including individuals in its membership who possess

- *a commitment to the mission of the PIC*
- a *conviction* about the goals and functions of the PIC
- a *willingness* to devote time and effort to the PIC.

During the process of Council composition, replacement, or renewal, the PIC should strive toward getting (1) the widest private sector representation possible, and (2) the most influential business leaders available.

To decide on the *type of members* to be selected, the PIC may choose

- heads of major corporations and small businesses who can lend their prestige and who can influence the local community as a whole to participate in and support the activities of the PIC, and
- company operational managers who may offer less influence but more technical expertise.

The PIC that is supported by a large, strong professional staff may have a less acute need for additional technical expertise. The PIC that lacks the support of a full-time professional staff may have a more critical need for the technical expertise the volunteer business manager can offer.

Some PIC's are maximizing the use of both types of members through committee structures designed to draw upon the different types of expertise offered by the corporate head and the manager. This committee structure is called the "two tier" approach and accommodates both types of members to the fullest extent. The first tier involves top level business and community leaders who have been appointed members of the PIC and who serve the PIC as members of a Board of Directors.

The second tier consists of individuals who are not appointed members of the PIC but

who have been recruited to serve on ad hoc advisory committees structured around specialized needs or programs. The second tier allows the PIC to draw upon specialized knowledge, skills, and expertise directly related to the ad hoc committees structure.

The PIC may also find the "two tier" approach an excellent way to increase private sector participation through short-term volunteer involvement in ad hoc committees.

Additional *factors* to be considered in determining the most appropriate size and most effective composition of the Council include:

- size of the labor market areas
- number and type of local business organizations and groups
- staff and services support required to accomplish PIC activities.

What Governing Rules Are Needed?

The PIC, at a minimum, should have a set of rules or bylaws that govern its internal affairs. In addition, the PIC should establish a clearly defined structure of board operations. Bylaws establish the framework for PIC operations and differ depending upon local circumstances. Bylaws should cover the following sections to be the most useful to the PIC:

- name and purpose of the Private Industry Council
- a description of the PIC's organization, powers, and member selection process and term of office
- procedures and scheduling of meetings
- duties, selection process (including substitutions) and term of office of PIC officers
- duties and powers of committees
- executive director's responsibilities
- procedures for amending the bylaws
- dues, if applicable (may be beneficial for fundraising as well as for securing membership commitment).

What Types of Committees Are Needed?

Council operations are facilitated through the use of committees. The most effective structure will be one designed to address the needs and problems of the local labor market and which has the flexibility to adapt as local circumstances change. The PIC has the options of appointing three basic types of committees:

- Executive committees
- Standing committees
- Ad Hoc committees.

Executive Committee
Executive committees are usually composed of the PIC's officers, the chairpersons of the standing committees, and other members as prescribed in the bylaws. The chief function of the executive committee is to plan the work of the membership and to exact responsibility from them by providing agenda and other guidelines for board action. Executive committees also provide guidance to the staff between meetings. Finally, executive committees should have authority to make decisions in emergency situations.

Standing Committees
Standing committees are establised on a permanent basis and may be descnbed in the PIC's bylaws.

Optional ways for the PIC to organize and structure its subcommittees are around

- Program activities such as:

  —OJT/skills training
  —pre-employment training
  —marketing.

- Industry groupings such as:

  —construction
  —manufacturing
  —transportation.

- Operational functions such as:

  —planning
  —finance
  —public relations
  —personnel.

The most effective ways for the PIC to organize its committees will be determined by the role of the PIC and the characteristics of the local business community.

Ad Hoc Committees
Ad hoc committees are formed for specific purposes and for limited duration. After carrying out their assigned functions and making recommendations, they usually disband.

How Can Committee Productivity Be Established and Sustained?

Besides providing the staff support that is critical to committee operations, the PIC can *establish* and *sustain* productivity among committee members by

- ensuring that assignments are based on individual interests and expertise
- providing initial orientation and ongoing training and development activities for members.

Appropriate Assignments
The issue of member involvement is closely related to committee structure. Members who come to the PIC can become turned off quickly if their talents and skills are not used effectively. The PIC chairperson should consider the following objectives in making assignments to subcommittees:

- participation of as many members as possible on one or more subcommittees
- selection of at least one individual who has expertise or experience in the area of the subcommittee
- assignment of members to subcommittees on which they have motivation and interest to serve
- usefullness of the member for decision-making purposes.

Orientation and Training
In order to increase the effectiveness of its members, PICs must establish an initial orientation and ongoing training and development activities for members.

The initial orientation to the PIC should include:

- Description of the PIC's purpose, objectives, major roles and responsibilities
- Presentation of a PIC orientation manual with the following information:
  - —bylaws
  - —organizational chart
  - —job descriptions
  - —a list of members with addresses and phone numbers
  - —a committee list with assignments
  - —a list of all programs
  - —operating policies of the board
  - —information on the relationship of the PIC to the prime sponsor, other community groups, institutions, and organizations
  - —sources of funding
  - —long-range plan
- Brief overview of the CETA system
- Brief history of Title VII
- PIC Annual Plan.

Ongoing training and development for members must be of a very high quality and not unnecessarily time consuming. Usually it should be designed so that it can be conducted during regular meetings of the PIC. Some PICs provide training at the members' work site. In addition the PIC may find longer term training sessions such as retreats to be of great value when designed and scheduled carefully.

Training topics may include areas relating to the dynamics of an effective PIC such as:

- PIC membership/staff relations
- PIC/CETA relations
- planning/goal setting
- decision making/problem solving
- monitoring and performance evaluation.

The NAB in Washington in cooperation with its Regional Service offices will provide training packages designed to meet the needs of the PIC membership (See Appendices I and II).

How is the PIC Staffed?

The importance of capable, efficient, and committed staff support cannot be over-emphasized. The quality of staff is a critical component of the PIC's capacity to have an impact. Staff should be knowledgeable about and sensitive to the needs of the private sector.

Some PICs are in a position to hire fulltime independent staff. The prime sponsor staffs other PICs, often without PIC approval or concurrence. The important point is to get *qualified, committed staff*, regardless of the source.

Staffing needs vary according to the structure and role of the PIC. PICs that are purely advisory in nature will have different staffing needs than independent program operators. The key factor for a PIC is to have in place a *mechanism* controlled by the PIC to hire, train, and replace staff that the PIC feels are competent for the job.

Why Should the PIC Develop Interorganizational Relationships?

In addition to developing a cohesive and functional internal structure, the PIC should *develop and maintain strong and cooperative interorganizational relationships* with the organizations and individuals around it to

- provide a forum for the private sector, organized labor, community based organizations, educational institutions, economic development organizations, and others to exchange ideas and strategies to solve employment and training problems
- identify and draw upon the vast pool of resources vested in other organizations
- build a constituency of individuals and organizations that support private sector initiatives
- participate in cooperative planning and implement cooperative initiatives, especially in concert with the CETA Planning Council and local CETA Director and staff.

The PIC's interactions with these organizations and individuals in its environment may significantly influence what goes on within the PIC, the form of the PIC, and the consequences of its actions. The nature of the relationships themselves and the bases and forms the interactions take will affect the PIC's decision-making, allocation of resources, communications, power, and leadership capability.

The right type of interaction at the appropriate time may be crucial to the PIC's short and long-term effectiveness. The PIC's interorganizational relationships may take a variety of forms and may range from conflict to cooperation. Most PIC's interactions probably take the form of bargaining and exchange relationships. The sharing of common clients, programs or financial bases may lead to increased interaction—either cooperative or competitive.

The ability of the PIC to impact on the employment and training system will be increased if it is supported by a coalition of supportive individuals and organizations. The extent to which a PIC focuses on the effective use of these resources may well determine the extent of its impact.

The challenge for the PIC is to *effectively communicate and interact with vested interest groups and power systems* for the mutual benefit of the private sector and the unemployed.

What Linkages and Community Relationships Influence the Effectiveness of the PIC?

The PIC must establish linkages and relationships with many actors in order to maximize its ability to be an effective force in the local community. Key among these actors are:

- CETA prime sponsor and local CETA director and staff
- local business community
- Regional Department of Labor Office
- Job Service
- economic development councils and groups
- Chamber of Commerce

- National Alliance of Business
- labor organizations
- trade organizations
- educational institutions
- apprenticeship agencies
- community based organizations
- chief elected officials.

This list is not exhaustive and specific linkages and relationships have to be decided upon at the local level. The point for the PIC is that it must *use and leverage available resources to its maximum advantage.*

A detailed discussion of all necessary linkages and relationships is not within the scope of this document; however, a brief discussion is provided of:

- PIC/CETA relationships
- Relationships with the business community

PIC/CETA Relationships

In order to redirect the employment and training system, the PIC must first work well with the CETA system that is in place.

The key actors in the CETA system with whom the PIC needs to establish close and effective relationships are:

- CETA Prime Sponsor—Chief Elected Official
- CETA Director and staff
- CETA Planning Council

Chief Elected Official
The decisions made by the PIC in the context of the complex CETA system are complicated and political. For this reason, the PIC needs to be politically astute. One means by which the PIC may strengthen its political influence is by initiating, developing, and maintaining direct and open communications with the Chief Elected Official. A supportive relationship may heighten the PIC's political status and increase support for the PIC and its programs.

CETA Director and Staff
Cooperative relationships between the PIC and CETA staff are associated with PIC success. The PIC should position itself to work well with CETA staff and should clearly delineate the relationship. The PIC will benefit from a relationship with CETA staff in which ideas are openly shared, decisions that affect both are cooperatively worked out, and programs are developed jointly for mutual advantage. The PIC needs to take advantage of the CETA staff's experience and expertise and utilize this resource to the fullest extent possible. The PIC may also need to draw upon the administrative resources of the CETA system. Cooperative, supportive relationships will encourage CETA system support for the private sector initiatives that the PIC feels are most useful and effective. The PIC should strive toward establishing the types of working relationships which will facilitate and not inhibit PIC programs and which will increase the PIC's chances to impact on programs other than Title VII. The ideal is an equal and cooperative effort between the PIC and CETA staff in solving the problems of the employment and training system. The PIC should strive toward this ideal.

CETA Planning Council

The CETA Planning Council is the planning arm of the Chief Elected Official (prime sponsor) and is responsible for planning for all CETA titles. The PIC has a responsibility to cooperate with the CETA Planning Council by

- consulting with the CETA Planning Council on development of the Title VII program
- affording the Planning Council the opportunity to review and comment on the Title VII Annual Plan.

The PIC should not be subordinate to the CETA Planning Council for purposes of Title VII.

The chairpersons of the PIC and CETA Planning Council should serve at a minimum, as ex-officio members on each other's councils and may be granted full voting status, if desired.

The Business Community

The involvement and broad support of the business community is crucial to the success of PIC programs and activities. PICs must have something to offer. Fluff doesn't sell too well in a marketplace that is driven by the profit motive. Successful PICs have developed strategies that are targeted to fill existing service gaps. The PIC that tries to be all things to the business community may risk overextending itself. Key for the PIC is the development of specific programs and/or activities that genuinely meet specific local business needs. Once the PIC is confident of what it has to offer, then efforts to increase visibility through marketing and other activities should result in greater business support and involvement.

Large businesses may be especially valuable to PICs by providing the leadership needed to solve social and and economic problems. Small businesses may be especially valuable in helping the PIC to impact by defining needs and hiring the unemployed.

Participation Options for the Business Community

A set of activities in which members of the business community may engage is presented below.* The Private Industry Council may select from these options the types of participation it wishes to encourage within the business community:

- Develop, advise, or react to curriculum for training programs
- Provide on-the-job training slots
- Operate training programs directly
- Provide information on labor market conditions and needs
- Participate formally and informally in placement of CETA trainees
- Participate formally or informally in the recruitment of CETA participants
- Donate equipment or material for training programs
- Provide personnel to actually participate in training programs
- Loan executives for various functions
- Provide technical assistance in the management of CETA operations
- Provide summer jobs for youth
- Provide legal services
- Provide financial support
- Evaluate programs
- Help set up management information and accounting systems.

* Identified in a Department of Labor study by Ohio State University, Report #5.

Section 1
Part C

Private Industry Council Effectiveness

Can An "Ideal" Private Industry Council Be Developed?

There is no "ideal" Private Industry Council. All PICs will be different according to local conditions. However, there are certain characteristics that the PIC may want to consider in trying to increase its effectiveness and impact. The PIC that possesses these characteristics is *not* guaranteed success—but *its potential for success may be increased.*

The "ideal" Private Industry Council will be characterized by:

- A set of goals understood by all and adapted to local conditions
- Good staff with modest turnover and a well defined process for staff replacement
- Moderately stable membership with clear membership replacement criteria and procedures
- A fairly large core of active members (no more than a quarter to a third of the members should be relatively inactive or non-contributing)
- Active, visible, and numerous business people
- Active chairperson with stature in the community and commitment to PIC goals
- Active development of its own initiatives rather than passive ratification of initiatives of others
- Modest visibility and credibility in the local community or commitment to a specific strategy and rough timetable to develop such
- Observable impact on Title VII programs and potential to impact on other CETA programs and on programs outside the CETA system
- Productive relations with local CETA staff which are free from non-supportive attitudes and actions.

These characteristics were identified in a study of currently healthy and promising PIC's by Ohio State University, Report No. 5 (see Appendix II).

How Effective Should A PIC Expect To Be?

Private Industry Councils have varying degrees of potential for development. Some Private Industry Councils will be able to perform a stronger, more significant role than others. However, all PICs have the *potential for influencing* the public/private-sector partnership in various ways. The key is for each PIC to *develop its potential* to the fullest and to *use its assets* in the most effective manner.

Even after the PIC has set clear goals, selected the most appropriate roles, and organized and structured itself for maximum effectiveness, local conditions may limit its potential for impact.

Factors which may influence the PIC's ability to impact include:

- funding
- technical assistance
- availability or lack of resources in the locality
- local political environment.

The presence of strong, productive *leadership from the private sector* combined with participation and *cooperation from government* will enhance the PIC's potential to impact. Some PIC's will be able to start out on such a base. Others will need to focus a variety of resources to develop it.

Section 1
Part D

Strategic Suggestions

Decision Making

CETA is a complex system operating in highly differentiated local environments. The PIC must deal with miltiple goals, a wide range of programs and activities, a mix of involvement by organizations at different levels, and a variety of divergent interests. For these reasons, it is inappropriate for the PIC to make quick judgements and easy, simple decisions. Well thought out decisions based upon timely and accurate information will increase the PIC's ability to impact.

Sharing of PIC Expertise

By making use of the experience of others, the PIC can develop strategies designed to overcome limitations imposed by local conditions. Both the "successes" and "failures" of individual PICs can offer valuable lessons to others. Although what works best in one locality may not necessarily be what works best in another, some meaningful conclusions and helpful suggestions may be drawn and applied. The PIC that can anticipate the types of development problems it *may* face has a better chance of resolving these problems before they become overwhelming.

Types of expertise and experiences valuable for PICs to share with each other are

- processes used by PICs to develop rapidly or effectively
- PIC organizational and structural arrangements which have worked well, such as committee structures and staffing patterns
- translation of general concepts and methods into reality and action by PICs
- "missed opportunities" which may raise red flags to other PICs
- "Successful" programs which may serve as models to others (The NAB PSIP Clearinghouse is the main source of assistance in this activity).

Institutional Base

A strong and solid institutional base can significantly increase the PIC's potential to impact. In addition, recent studies have advanced the assumption that *just the existence of the local, business controlled PIC serves in itself, to generate interest.* The challenge for the PIC is to stimulate and translate that interest into active participation that helps to resolve employment and training problems.

Political Savvy

The Private Industry Council, as part of a community network of individuals and organizations, is a political entity. The PIC needs to be able to deal with political accountability in all phases of its development and operations.

The PIC needs to strengthen, not its partisan political activities, but its *political influence.* Without political support, the PIC's programs will either not happen or success will be limited.

The PIC may increase its political sophistication and thereby enhance its potential to impact by

- becoming more knowledgeable about the political context in which it operates
- keeping itself politically informed of changes and trends
- consciously engaging in building a constituency of individuals and organizations supporting private sector initiatives
- positioning itself in the local political environment for maximum influence and leverage.

Section 2

PIC Planning, Management, and Evaluation

Introduction

Many PICs have thus far had to devote a large amount of time and resources to organizing and structuring themselves for maximum effectiveness (as discussed in Section 1). As the institutional base of the PIC is strengthened, as its programs are implemented, and as its activities and successes increase, a more critical need emerges for the PIC to plan, manage, and evaluate.

Section Two addresses this pressing need. It highlights a sound planning, management, and evaluation (PME) process, discusses the usefulness and benefits to be derived from implementation of the PME process, and suggests how PME can contribute to the success of the PIC.

The PME process described in this section is being developed for PICs by the National Alliance of Business. A field test at 10 Private Industry Councils will be used to refine the process. All aspects of the process are discussed in detail in NAB's guide—*Planning, Management and Evaluation: Realizing PIC Potential.*

A working draft of the guide will be published in June, 1981 for distribution to PICs through the NAB Regional Service Offices. In addition, Regional Service Office staff will provide technical assistance to PICs interested in implementing the PME process (see Appendix I for NAB Regional Service Offices to contact).

Section 2
Part A

The Need to Plan, Manage, and Evaluate

Why Should A PIC Plan, Manage, and Evaluate?

There is a direct and undeniable positive relationship between (1) a PIC's capacity to plan, manage, and evaluate and (2) the quality and impact of its overall operation.

To increase its effectiveness, the PIC should adopt a comprehensive planning, management, and evaluation *approach* and utilize a sound, ongoing PME *process* in order to

- develop an Annual Plan which is responsive to private sector needs
- develop effective, high quality programs
- manage performance
- enhance chances for success and impact.

Title VII legislation which supports the PIC requires that the PIC plan, review, and assess its activities. However, satisfying federal regulations should not be the purpose of PME. Simply stated, the PIC should plan, manage, and evaluate to ensure local control and accountability and to ensure the most effective performance by the PIC and its programs.

Prime sponsors are required to establish a planning process that involves a wide spectrum of groups and individuals. Clearly, the PIC needs to establish itself as the *central contact for private sector input.* To do this, the PIC must know thoroughly the existing CETA planning process in order to decide where and when to intervene. The PIC will then be able to develop an intervention strategy that will maximize PIC influence on the overall CETA Prime Sponsor Employment and Training Plan.

The key is for the PIC to determine how and in what ways it wants to influence employment and training programs and then *establish a mechanism or process for providing that influence on a continuous basis.*

The PIC can take a fundamental step toward improving its effectiveness. It can do so by examining its current capability to plan, manage, and evaluate its overall operations as well as day-to-day activities and specific program activities. If, after examination, changes need to be made, the PIC should establish a comprehensive framework for organizing, directing, overseeing, and assessing its performance.

Section 2
Part B

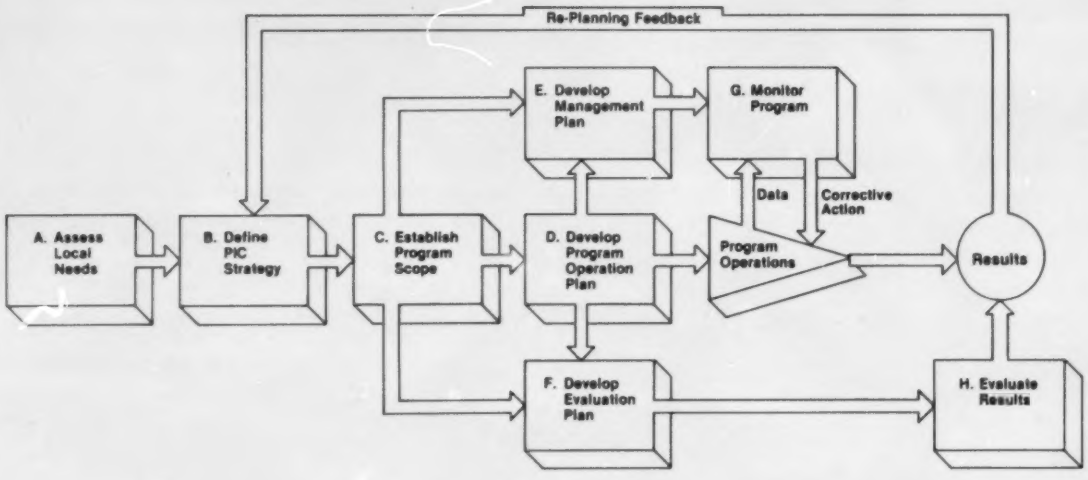
The Planning, Management, and Evaluation Process

What Is A Sound Planning, Management, and Evaluation Process?

The PME Process in this section is a systematic method which a PIC can use to establish and implement its programs. It is designed to help the PIC ask those questions and take those steps most essential to effective decision-making and program operations.

The Process involves 8 major stages which are designed to allow the PIC to make decisions related to its organization, operations, methods, and procedures in a logical, structured order. These stages of the PME process are presented in the flow chart below. The results of each stage which may be useful to the PIC are identified in the chart on page 27.

PIC PME Process Flow Chart



Specific descriptions of each stage in the PME Process and details on how to apply the PME Process are provided in the guide—*Planning, Management and Evaluation: Realizing PIC Potential.*

How Can The PME Process be Useful to the PIC?

The PME Process can be useful to the PIC both as (1) a decision-making tool and as (2) a procedural guide.

The PIC may increase its potential to impact by using the PME process to decide:

- *What local needs are*—the nature and dimension of employment and training problems within its community
- *What the PIC wants to accomplish*—its purpose, roles, and goals
- *What to do*—specific objectives to achieve and projects and activities to sponsor through the PIC
- *How to do it*—methods to employ for implementing each project and the PICs overall program
- *How to support it*—the amount of resources (time, people, money) to use for each activity

- *How to control it*—the system for monitoring progress and performance and for taking whatever corrective action may be necessary
- *How to assess it*—the mechanisms for evaluating results and accomplishments
- *How to redirect it*—the procedures for feeding information back to the PIC for replanning.

Sound systematic decisions may help promote the desired changes within the existing employment and training system that the PIC desires.

The broad *areas* in which the PIC may apply the PME Process and the *usefulness* of the process in each area are:

- *Program Development*—to identify community needs, pinpoint barriers to private sector initiatives, assess program performance, establish a program approach, and design and implement programs.
- *Performance Management*—to aid in directing and controlling the PIC's program through a process which encourages defining clear goals and operational strategies, establishing program performance standards and monitoring methods, determining corrective action procedures, accountability in program delivery and evaluating program performance.
- *Compliance*—to aid in development of a CETA Annual Plan in which private sector needs are clearly and effectively reflected in the Plan's goals, target groups, services and activities, review systems, program performance standards and PIC responsibilities and procedures.

How *useful* and *meaningful* the PME Process will be to the PIC depends in part on how the PIC carries out each stage of the process and the results. The chart on the following page highlights the results and benefits to be derived by the PIC from sucessful completion of the PME Process presented in the flow chart on page 25.

Stages of the PME Process and Results

STAGE	RESULTS
Assess Local Needs	• Provides data to design PIC programs and activities
Define PIC Strategy	• Establishes program direction
Establish PIC Program Scope	• Defines specific program objectives and projects
Develop Program Operations Plan	• Identifies PIC agenda and performance standards
Develop Management Plan	• Spells out management review processes, approach to analysis of program operations, and reporting processes and procedures
Develop Evaluation Plan	• Provides data to document (1) effectiveness of programs and (2) corrective actions needed in replanning
Monitor Program	• Documents actual program performance on an on-going basis
Evaluate Results	• Provides data upon which to formulate the coming year's plans.

Section 2
Part C

Strategic Suggestions

Demonstrating Program "Success"

Title VII provides the Private Industry Council with a special opportunity—to demonstrate a wide range of private sector employment and training programs. The PIC is in a unique position to generate *locally-defined, business-oriented performance criteria* which will produce genuine program "success" in terms of private sector perspectives. The PIC's ability to meet this challenge and its ability to "demonstrate success" will influence the direction and significance of future PSIP programs. A sound planning, management, and evaluation approach and process can provide one of the means by which the PIC can document and demonstrate its success.

Scarce Resources

The employment and training system is and will be faced with the problem of addressing critical needs with scarce resources. In this environment, accountability becomes crucial. The PIC may be faced with an even greater need to get "the most" with "the least." The combination of escalating employment needs addressed with dwindling dollars makes compelling demands on the PIC for bottom-line results. Sound methods of planning, management, and evaluation can assist the PIC in meeting this challenge.

PIC/CETA Planning

The Private Industry Council should be run as a business. Yet, in planning it must adhere to government regulations and deadlines. These can make it difficult for the PIC to obtain timely committment of resources and to coordinate funding allocations with program startups.

Some problems are beyond the control of either the PIC or the CETA Prime Sponsor. For those that can be controlled, the PIC will find close *cooperative planning with the CETA Planning Council and the Prime Sponsor* to be an asset.

An effective *PME process* can serve the PIC by helping to establish and maintain the type of ongoing cooperative planning that is *meaningful* and *useful* to all concerned. The ability of the PIC to impact on the overall employment and training system should be enhanced by such an approach.

Section 3

Employment and Training Program Options

Introduction

The Private Industry Council is in a unique position to try to ensure that employment and training programs *genuinely respond to and address private sector needs*. PICs are currently influencing programs as program planners, advisors, brokers and operators. Many PICs are now entering a stage of development where their capability to shape employment and training programs is high.

Section Three is designed to help the PIC decide on the ways it wishes to become involved in employment and training programs and to choose the types of programs it prefers.

The Section discusses major employment and training programs and their advantages and disadvantages. It presents options on ways and means the PIC may participate in programs and provides suggestions on how the PIC may increase program response to businesss needs and problems.

The programs included in this section of the handbook are characterized by having enrolled participants and are generally the more common and more conventional employment and training programs. Section 4 of the handbook: "Employment Generating Services Activity Options" also discusses program options, but the EGS programs included in Section 4 differ from those in this section in the following ways: (1) they may not necessarily have participants, and (2) they are generally the more unique and innovative of the program spectrum.

The major types of employment and training programs described and discussed in this section are:

- Classroom Training
- On-the-Job Training
- Customized Training
- Upgrading and Retraining
- Pre-Employment and Job Search
- Youth and Other Targeted Programs.

Types of Employment and Training Programs

What is Classroom Training?

Classroom training is occupational skills training that results from the interaction between a group of students and teachers in a classroom setting—not the work site. It is one of the most common CETA programs.

The advantages and disadvantages of classroom training are presented in chart form to help the PIC decide on its appropriateness and usefulness.

Classroom Training: Advantages and Disadvantages

ADVANTAGES

- Tends to produce more permanently trained individuals
- Can, if done properly, provide a setting and framework wherein all aspects of skills training, job preparation, and job readiness are considered
- Develops personal discipline and participation habits that can carry over into the work setting
- Is more appropriate for training in sophisticated, technical areas than OJT.

DISADVANTAGES

- May be less flexible than other training approaches
- May involve costly investment when staff, facilities, and equipment aren't readily available
- Develops an institutional life of its own making it hard to dismantle
- Need to take care to insure relevancy to local labor market
- Depends on availability of job immediately upon completion.

What is On-The-Job Training?

On-the-job training (OJT) is training given by an employer to individuals recently hired. The trainee learns the job while actually engaged in productive work, using the employer's own procedures, tools, and equipment, and works according to a particular employer's requirements.

On-the-job training is an attractive program and has many advantages. However, some problems have been identified by the National Alliance of Business in its ten years of job development experience with OJT contracting. The following findings may help the PIC implement a more effective on-the-job training program in its local community:

- The OJT marketing organization needs a professionally managed administrative structure and a business-oriented marketing and sales approach to employers.
- Contracting systems for OJT should be simplified to avoid excess paperwork or delays in processing payments to employers.
- The CETA and Job Service client referral systems need to be improved and organized to respond effectively to employer needs with rapid and accurate referrals.
- OJT marketing needs strong support from the policy and administrative mechanism of the public agencies which operate the employment and training system.
- A business to business marketing approach supported by a permanent professional staff is the most effective marketing and administrative tool for OJT programs.

On-The-Job Training: Advantages and Disadvantages

ADVANTAGES

- Clients start work immediately
- Clients are trained for an existing job and don't face the uncertainty that a future job may not exist
- Trainee is exposed to an actual work environment
- Trainee is trained according to employer needs and desires
- Trainee immediately becomes a productive member of the workforce
- Employer shares cost of training
- Placement rates are often better than other training programs.

DISADVANTAGES

- Some clients lack the basic education and social skills needed to meet entry level requirements
- Clients may need supportive services to adjust or benefit from training
- OJT seems to be feasible and best suited for entry level jobs
- OJT not suitable for certain kinds of jobs
- OJT may prove costly to employer since greater time demands are placed on supervisors and it may slow down production
- Often workers who provide training to newly hired employees are not good instructors
- Supervisors and instructors may need special assistance in learning to deal with the disadvantaged person effectively.

What is Customized Training?

Customized training can be either classroom training or OJT, separately or in a combination. It differs from either because of the greater level of employer involvement in curriculum planning, the specificity of training provided, and its relevance to the employer's operation.

Employers may provide all or some of the instructors and training facilities on company sites. Employers may design the training curriculum, secure OJT slots and "real" jobs for training graduates. The commitment and involvement of the employer exists at the inception of the program.

The major advantage of customized training is that it may be the most saleable PIC program because of the tailoring to meet specific private sector needs. To many, this model epitomizes the intentions of PSIP.

What is Upgrading and Retraining?

Upgrading is skills training to teach new or advanced skills to currently employed workers.

Retraining is skills training to teach different vocational skills to workers whose skills are not currently in demand.

Methods For Upgrading and Retraining

The PIC has the option of upgrading skills and retraining through

- On-the-job training (the most frequently used)
- Structured off-the-job training in classrooms, shops, or clinical training situations (less frequently used but the existing programs appear to offer a higher degree of private sector involvement)
- Combinations of OJT and classroom/shop training.

A higher degree of private sector involvement exists in current upgrading and retraining programs which are conducted in classrooms, shops or clinical off-the-job settings than those conducted on the job.

Changing Regulations and Use of Upgrading and Retraining

Overall, CETA activity has been quite limited in upgrading and rare in retraining. However, the Private Industry Council has recently been presented with new opportunities to upgrade and retrain workers through the May 1980 CETA Amendments which provide for upgrading and retraining activities under Title VII.

Other recent (1978-1980) *changes in regulations* which should encourage the use of upgrading and retraining include:

- 15% of Title VII funds may now be used for upgrading and retraining (December 1980 CETA Amendments).
- Client eligibility criteria has been liberalized (20CFR, Sec. 675.5-7) allowing in some cases for upgrading of persons who are not economically disadvantaged if the employer agrees to hire at least one economically disadvantaged person for each employee upgraded (the backfill requirement, 20CFR, Sec. 679.6(b)(3)(i).
- Maximum flexibility in granting waivers to the backfill requirement which appears to be an impediment to upgrading is expected to be exercised by the Department of Labor's Regional Offices.

Although upgrading and retraining seems to be attractive to employers and program outcomes for participants are good, only a few PICs are currently involved in upgrading and retraining programs. The potential for "success" by means of upgrading and retraining appears high, especially in areas experiencing high industrial layoffs.

The PIC who wishes to take fuller advantage of this opportunity to impact on the employment and training system by upgrading and retraining workers might wish to increase its understanding of upgrading and retraining by

- exploring the appropriateness and determining the applicability of upgrading and retraining to the local labor market
- increasing its knowledge of the variety and effectiveness of different activities and programs
- increasing its understanding of regulations and seeking clarification/interpretation of the terms and conditions under which the programs may operate and of funding considerations.

Advantages of Upgrading and Retraining

ADVANTAGES OF UPGRADING

- High success rates in reciprocal (one-on-one) entry level hiring of other CETA clients in unsubsidized jobs
- Can lead to significant improvement in CETA relationships with employers and improve employers attitudes toward CETA clients
- May include participants who are not economically disadvantaged
- Provides chance for low-salaried, relatively low-skilled workers to acquire new skills
- Makes possible more direct movement into higher paying, more desirable jobs
- Participants prepare for better jobs yet retain the security of their current employment
- Good tool to use in economic development efforts to retain workers or expand opportunities for structurally unemployed or underemployed workers.

ADVANTAGES OF RETRAINING

- Workers need not be unemployed though they must have received a bona fide layoff notice within the last six months
- Income does not affect eligibility
- May cost less than the usual stipend training in the same occupation when participants who have been laid off to receive training are eligible for Unemployment Insurance
- A pre-hire or hire-first commitment is not required for laid off workers whose former employer does not express interest in retraining
- Promotes involvement of labor unions in development of retraining programs for laid-off workers and offers them meaningful ways to participate in PIC activities
- Good tool to use in economic development efforts to retain and retrain workers or expand job opportunities for the structurally unemployed or underemployed
- Participants in both upgrading and retraining activities may be eligible for "supportive" employment and training services such as health care, child care, job search and pre-employment training.

What is Pre-Employment and Job Search Training?

Pre-employment training involves no occupational or skills training. Instead, it aims to get the enrollee "ready" for work through motivation, orientation, self-assessment, and by sharpening resumé-writing and interviewing skills. Such programs may or may not be a component of OJT or classroom training.

The major current advantage of pre-employment and job-search training programs lies in its appropriateness and potential to aid in the CETA Public Service Employment transition.

What are Youth Programs and Other Targeted Programs?

Youth Programs

Youth programs address the high unemployment rate among poor youth and the need to prevent dropouts from school so that the youth of today do not become the adult employment and training client of tomorrow.

Some of the *options* available to the PIC in shaping and forming youth program activities are:

- Summer Jobs for Youth Promotional Campaigns—

  PIC marketing of private sector summer jobs for disadvantaged youth.

- Career Guidance Institutes (CGI)—

  PIC technical assistance to educators and school counselors in which local private sector employment and training needs are defined; PIC promotion of education to match requirements of the jobs in current demand.

- Youth Motivational Task Forces—

  PIC members serve as "models" of success to help youth, through discussion of their own experiences, develop both academic and practical work experiences which will lead to careers in private business.

- Vocational Exploration Programs (VEP)—

  PIC exposure of youth to private sector career and vocational opportunities and options through structured programs which relate these vocations to student interest, aptitude, and educational curriculum.

One disadvantage of youth programs is that they may require a great deal of coordination effort with educational institutions, community based organizations, and the private sector which the PIC might not feel staffed to undertake

In the last ten years, the National Alliance of Business has developed a series of youth programs which can be implemented by a PIC. Specific information on program models may be obtained from the PSIP Clearinghouse.

Other Targeted Programs

"Other targeted programs" are provided to meet the needs of specialized groups such as the handicapped, ex-offender, and women. These programs are designed to help remove barriers to employment or provide the support needed for employment.

All PICs should undertake efforts to identify individuals and groups with special needs in their localities and to determine their specific employment problems. If applicable to the local situation and appropriate, the PIC in an area with a high concentration of individuals with special needs may wish to target programs for these specialized groups. Such programs may be an effective means for the PIC to demonstrate success in the private sector employment and training of disadvantaged persons.

Section 3
Part B

PIC Program Participation

What Roles Should the PIC Play in Programming?

The PIC may participate in programming through the broad roles of program (1) advisor, (2) broker, or (3) operator (see Section 1 page 3).

At a minimum, PICs are in a position to *advise* the prime sponsor and to plan and design CETA programs that assure the needs of the private sector are met. The PIC may also be in a position to *broker* programs and influence the private sector to provide opportunities for the economically disadvantaged which may have previously been denied them.

Some PICs with strong capabilities may wish to participate in PSIP programming to the fullest extent by directly *operating* programs themselves.

A summary of the broad roles a PIC may assume in programming and specific activities related to these roles is presented in chart form on the following page. The Private Industry Council may select from these options the roles and activities most likely to promote achievement of its objectives.

What Should The PIC Consider When Making Program Choices?

The PIC that has decided to assume the role of program operator should try to select the most appropriate and potentially effective programs. In selecting or designing employment and training programs and activities, the PIC needs to *weigh the prospective program* against the following factors:

- number and type of people to be served
- amount of duplication of conventional CETA Title II-B programs
- degree of innovation
- past history of the program and its performance
- cost effectiveness
- respective roles of large and small businesses
- extent of private sector input
- "mesh" with other activities such as economic development
- responsiveness to private sector needs
- adequacy of incentives to attract business participation and support
- effectiveness of the program in resolving structural unemployment.

For specific information on the process of selecting and designing programs, see NAB's guide—*Planning, Management and Evaluation: Realizing PIC Potential.*

Training Program Role/Activity Options

PIC ROLE	PIC PROGRAM ACTIVITY
• PROGRAM ADVISOR	PLANNING: • Identify needs • Pinpoint private sector "gaps" • Advocate better funding for programs in areas of urgent labor market needs • Plan and design programs to meet the needs of employers • Assist in curriculum development EVALUATING: • Survey all local programs • Review specific programs • Assess responsiveness to private sector needs • Evaluate overall effectiveness • Establish industry-based quality control standards
• PROGRAM BROKER	• Publicize need • Solicit support to fill "gaps" • Promote "customized" design • Disseminate program information • Coordinate and link with others • Provide technical assistance to employers • Market programs
• PROGRAM OPERATOR	• Fund programs • Design programs • Implement programs • Administer programs by contract • Directly administer and operate programs.

Section 3
Part C

Strategic Suggestions

Program Directions

Viewed from a national perspective, *three basic themes* in PSIP program direction have emerged:

- design of programs to meet specific needs of specific industries and actual business participation from beginning to end
- establishment of new linkages and networks
- more divergent mix of program options and of funding.

The PIC should explore the relevancy and applicability of these themes in its local environment and take appropriate action.

Program Models

As PICs continue to develop their program expertise, models of exemplary programs are emerging. The PIC could gain substantially by identifying either directly or through a resource such as NAB these successful efforts. If appropriate, the PIC should put the experiences into practice. Negative attitudes toward CETA within the private sector which exist where CETA programs have failed *may* be partially overcome by implementing PSIP programs that have the greatest potential for success.

Upgrading and Retraining

In the current economic and political environment, upgrading and retraining of individuals should be of keen interest to the PIC, especially in areas where large-scale industrial layoffs are a concern. Regrettably, it appears that the retraining and upgrading provisions of Title VII are the least understood and that the programs are the least used. PICs would do well to explore further the potential for using more fully the upgrading and retraining programs.

Section 4

Employment Generating Services Activity Options

Introduction

For the first time in almost twenty years of federally funded employment and training programs, an element has been written into the CETA regulations (20CFR, Part 679, May 20, 1980) that allows for and encourages activities and services that will indirectly result in placement of the hard to employ. This provision for Employment Generating Services (EGS) separates Title VII from all other CETA titles and gives the PIC an opportunity to undertake a wide variety of non-traditional activities.

Employment Generating Services are presented in this handbook as "activities" rather than "programs" although they are considered to be programming options. EGS was not included in Section 3: "Employment and Training Program Options" because they differ from the programs in that section by not necessarily having enrolled participants. In addition, Employment Generating Services is important enough to merit a separate section. EGS is presented in this section as a series of "activity" options as opposed to "program" options.

Section Four defines Employment Generating Services and discusses the Private Industry Council's role and involvement in EGS. Each of the major Employment Generating Services activities—Marketing, Labor Market Information, Economic Development, and "Other Supportive Services"—are described separately and discussed in relation to their importance and value to the PIC as a strategy that can be used to impact upon the employment and training system. Approaches which may enable the PIC to get maximum results from EGS are suggested.

Section 4
Part A

PIC Participation in Employment Generating Services Activities

What Are Employment Generating Services?

Employment Generating Services (EGS) are definied in the Code of Federal Regulations (20, Part 679) as:

> . . . activities which are not directly related to the immediate provision of training nor employment for participants but which are intended to result in the creation or expansion of employment opportunities for persons eligible under this Part . . .

In essence, Employment Generating Services are the single most unique feature of the Title VII program. Several features of EGS distinguish it from other CETA programs and from other Title VII activities and make it unique: (1) *no requirement* to have enrolled program participants in its activities; (2) *indirect* strengthening of training and placement, and (3) *flexibility* and *innovation* in the nature and types of activities.

The options available to the PIC for participation in Employment Generating Services fall into *four main categories of activities:*

- Marketing
- Labor Market Information
- Economic Development Linkages
- Other Supportive Services and Innovative Programs.

These options are discussed later in the text.

Should The PIC Be Involved in EGS Activities?

Employment Generating Services is a strategy that the Private Industry Council can use to increase job opportunities in the private sector for unemployed persons. The features of *uniqueness* and *innovation* provide an opportunity for the PIC to impact in genuinely new and *different* ways on the employment and training system.

An advantage of Employment Generating Services is that it can be an effective means for the PIC to demonstrate a clear strategic role to the local community at large. Labor market surveys, public recognition through marketing, and economic development linkages can all serve as major and highly visible signals to the local community that the PIC desires and is capable of assuming an important, significant, and dynamic role in the community.

A financial inducement to become involved in Employment Generating Services is also provided to the PIC by the regulations which allow 30% of PSIP program funds to be spent for Employment Generating Services.

Many PICs are taking advantage of the opportunity to participate in activities designed to create job opportunities. According to the National Alliance of Business' survey of 286 PICs across the country, 57% were engaged in some EGS activity (an increase of 23% since May, 1980), but only 15% had plans to expend up to the 30% allowable EGS funding. The use of alternative and complementary funding from a variety of resources may account for this figure which appears on the surface to be an economization of Title VII EGS resources.

PICs that are currently not fully using the funds available under this unique provision of Title VII are missing an opportunity to achieve maximum impact. The PIC can seek clarification of policy on allowable EGS activities through the Department of Labor's Regional Offices. Information about the level of effort required to implement EGS programs and types of approaches is available through the NAB PSIP Clearinghouse and NAB Regional Service Offices.

Additional information on how to determine what EGS activities to undertake, what program models are available, and how to implement programs can be found in NAB's *Employment Generating Services Handbook: Practical Models for Expanding Job Opportunites* to be published in July, 1981.

In What Ways Can a PIC Become Involved In EGS?

The role the PIC has chosen for itself determines the scope and character of the EGS activities the PIC wishes to participate in.

When the Private Industry Council's roles are broad, they should be reflected in its EGS activities. What appears to be emerging is a more comprehensive use of EGS funds—ranging from labor market surveys that should become the foundation of the PIC strategic plan to economic development projects that reach beyond existing CETA activities and promote and support job creation, expansion, and retention activities in the local area.

The most appropriate ways for the PIC to become involved in Employment Generating Services and the most effective means for doing so differ from PIC to PIC and locality to locality. The extent of the PIC's involvement in EGS and the types of activities which would be the most effective must be determined in the context of the needs and problems of the local business community.

As the PICs have established their roles and defined their activities and as their operational structures have emerged, a pattern of Employment Generating Services Activities has taken shape. Because of the diversity of these activities, all of the options available to the PIC are too numerous to delineate in this handbook. However, some of the options available are outlined in the chart on the following page.

Employment Generating Services Activity Options

The following options are some—but not all—of the ways the PIC may wish to become involved in Employment Generating Services. The Private Industry Council may select from these options but should *develop its own options* based on local needs:

- Provide technical assistance to private employers to reduce the administrative burden of employment and training programs
- Provide information to private employers so that they may use more fully PIC and prime sponsor programs
- Develop and market model contracts designed to reduce the administrative burden on the employer and model contracts to meet the needs of specific occupations and industries
- Design or conduct training programs that coordinate jobs, training, and education programs so persons can work for a private employer while attending training
- Conduct innovative cooperative education programs (such as small business internships) for youths in secondary and post-secondary schools designed to coordinate educational programs with work in the private sector.
- Market TJTC and WIN tax credits in conjunction with Title II-B and Title VII classroom training for the purpose of improving coordination of PSIP with other job development, placement, and employment and training activities
- Hire contractors to perform labor market surveys involving employer contacts to determine current or potential job openings for the purpose of developing job skill requirement forecasts to be used in the CETA planning process
- Develop and operate training programs in conjunction with other businesses to fulfill their personnel needs (the administrative functions are considered an EGS activity for funding purposes)
- Hire specialized PIC staff such as a business management specialist who might provide technical assistance to small businesses
- Develop linkages between employment and training programs, educational institutions, and the private sector (business people knowledgeable in labor market skill requirements may be hired for this purpose)
- Provide counseling and other follow-up services to employees and employers beyond the initial training period.

(Also see "PIC Marketing Options", Part B and "PIC Economic Development Activity Options", Part C of this section).

EGS: Marketing

What is Marketing?

Marketing is a process which enables the PIC to identify specific employer wants and needs, to develop specialized advertising strategies, and to initiate direct sales activities which will provide PIC services and incentives to employers initially targeted by PIC market research efforts.

A noted marketing professional has defined marketing as "an attempt to form mutually satisfying exchange relations." In a typical marketing transaction, both parties—the buyer and the seller—have the most to gain when they view their relationship as one of mutual benefit rather than one of conflicting interests. PIC marketing may create solutions to employers' wants and needs.

The PIC has the *option* of choosing to market itself and its programs in two main ways:

- Marketing *informally* through the PIC membership and using members as on-going salespersons to the private sector (see "PIC Role Options", Section 1).
- Marketing *formally* through planned, structured marketing approaches such as ad campaigns and organized drives.

Why is Marketing Important to a PIC?

The fact that marketing is the most popular form of Employment Generating Services activity shows that many PICs understand its value.

Effective marketing can serve the PIC by:

- Creating the desired level of visibility and community support for the PIC and PIC programs, and the prime sponsor and CETA programs
- Increasing business involvement in ways that ultimately lead to more jobs for the hard to employ.

Good marketing practices will enable a PIC to save time, operate in a more cost-effective way, and more readily meet its goals. Specifically, good marketing practices should help the PIC to:

- Draw up an annual employment program plan which reflects the employment and training needs of the community and local private employers, thus enabling the PIC to target sales efforts
- Increase private sector sales activities
- Develop an effective plan for action
- Increase the awareness of the community toward the PIC's product line
- Increase sales to private employers seeking PIC services and incentives
- Develop marketing plans to show local employers what the PIC is doing and how well it carries out its operations.

What Stage of Development Must a PIC Reach Before It Tries to Sell Itself?

Not all PICs need to be involved in major, formal, marketing initiatives. Marketing efforts should address the goals of the PIC and be clearly related to the PIC's strategy.

A PIC needs to have something to sell before it undertakes a *major* marketing effort. For the PIC that is in the initial developmental stage of institution-building, the best approach to marketing may be one of caution. Premature marketing may backfire if the PIC does not have the capability to deliver the goods. All PICs should plan carefully for the anticipated positive response from their marketing effort. PICs also should be able to effectively receive and act upon the responses.

Most PICs now have some degree of capability to address certain basic community employment and training needs. The PIC should focus in on *what it can do best and carry the message to employers* using a combination of direct employer contact and the media.

What Process Should the PIC Use in Marketing?

The marketing process includes three basic and distinct *elements*:

- Market Research and Analysis
- Advertising and Public Relations
- Sales.

Market Research and Analysis

As a first step in developing an overall "marketing plan", the PIC should decide what market research information is needed and available. Market research is a purposeful investigation of the PIC's potential market. It provides the type of information necessary for making sound marketing decisions in keeping with the PIC's level of resources.

To develop a market research program, the PIC must act to:

—Analyze Needs
—Set Objectives
—Develop Information Sources
—Establish Research Methods
—Identify Targets, i.e., Market Segments.

Advertising and Public Relations

Advertising and public relations each represent separate contributions to the PIC's total marketing effort, but each seeks a similar goal—acceptance and support of a product or program. The ultimate objective of each is to motivate sales.

Advertising and public relations carry a message. *Commercial* television and radio *advertising* involves the purchase of a particular slot of air time for the message. When advertising makes use of free air time it is known as a *public service announcement*, PSA. The credibility of the advertising message to a large extent, however, depends on the public relations effort. Public relations builds and maintains a positive image of the product, idea, and program.

Good public relations and well-designed advertising can not only promote acceptance of the product, but they can also turn around adverse opinions. They can show there is more than one side to an issue.

The *steps* the PIC will need to take in developing an advertising and public relations campaign are:

1. Define its audience
2. Determine "need to know" information
3. Decide on best method for communicating the message
4. Develop concept
5. Analyze relative costs
6. Decide on format
7. Determine mechanics of production.

Sales

Selling the PIC product line (PIC programs and services) is the final step of the marketing process. When the market research and analysis has been complete , the PIC will have the information and market data it needs to develop a sales strategy and prepare a sales plan.

The PIC sales strategy should include the following *basic elements:*

- Identity of the companies most likely to need or use PIC services and incentives
- Specific goals for each market segment
- Resources or products PIC sales staff will take to targeted employers
- Plan for hiring or recruiting PIC sales staff
- Plan for training PIC sales staff
- Plan for managing the sales campaign and the follow-up activities to guarantee delivery of promised products to participating employers.

Specific efforts must be made to inform the PIC sales staff of: (1) the psychology of selling; (2) sales call techniques such as openings, use of qualifying questions, identification of features, benefits and proofs, sales call objectives and closing; and (3) the basic steps in making a successful sales call.

The ultimate test of the reliability of the PIC sales system is the PIC's ability to sell its product line and commit its annual resource base. To be successful, the PIC should aim at serving the greatest number of businesses with the widest possible product/resource base. The result should be a significant increase in the number of clients placed in private sector jobs.

Marketing activities are presented in chart form below to aid the PIC in choosing approaches that coincide with their overall marketing strategy.

PIC Marketing Options

- Direct employer contact programs (found to be very effective)
- Brochures
- Speaking engagements by PIC chairpersons, members, staff
- Public service announcements
- Radio, TV, and newspaper advertisements
- Briefings, luncheons, seminars and workshops
- Direct mailings (found to be relatively ineffective).

This list is not exhaustive and descriptions of specific marketing programs are available from the NAB PSIP Clearinghouse.

Section 4
Part C

EGS: Labor Market Information

Why is Labor Market Information Important to the PIC?

The regulations require the PIC to "analyze private sector job opportunities including estimates by occupation, industry and location". *Labor Market Analysis* is one of the most tangible tasks a PIC can tackle. Results of the Labor Market Analysis should be used as an important means to determine the type, appropriateness, and priority of PIC activities and programs.

What Types of Labor Market Information Does the PIC Need?

Basic *types of labor market information* the PIC should have in order to define labor needs and make programs responsive to them include facts about

- types of entry level occupations
- number of entry level jobs
- types of existing job vacancies
- number of existing job vacancies
- growth potential by occupation
- labor force participation
- hiring practices
- specific job requirements
- personnel policies, especially training and promotional policies
- occupational skill requirements
- employer attitudes toward employment and training programs.

What Are Some Sources of Labor Market Information?

The PIC may (1) design and conduct labor market analyses itself, (2) contract for the service, or (3) use data already available. Many prime sponsors as well as economic development agencies conduct studies or surveys. The PIC may be able to retain and review data available from such sources as:

- The Job Service
- Bureau of Apprenticeship and Training
- Economic Development and Community Development Agencies
- CETA Prime Sponsors
- Economic Development Councils
- Department of Labor, Bureau of Labor Statistics
- Department of Labor, Employment and Training Administration, Regional Office
- State Occupational Information Coordinating Committees.

Available data may be inadequate for purposes of planning for the private sector. Judgement must be used in developing new data through a planned study or survey because many employers resent queries about business matters.

How Can The PIC Use Labor Market Information?

Labor Market Information covers a wide range of diverse facts that can be used for many different purposes.

The specific ways the PIC will use the Labor Market Information will depend upon the nature of the information, the PIC's purpose for gathering the information, and the type of decisions the PIC seeks.

General ways the PIC can use labor market information include:

- Identifying occupations or industries in which PIC clients can be directly placed into unsubsidized jobs
- Identifying the need for upgrading or retraining programs
- Identifying economic development linkages
- Determining PIC program choices
- Planning and designing programs which are based on valid labor market needs
- Evaluating program "success" in terms of labor market needs of the private sector
- Adjusting PIC programs and other CETA programs to accommodate the current labor market needs of the private sector.

To increase its impact on the community's employment and training problems, the PIC should use labor market information in the most effective manner and use information that is both *timely* and *accurate*. The key point is—if the PIC is not going to actually *use* market information in its decision-making or operating processes, there is no need to collect or analyze it.

For specific information on how to analyze local labor market conditions and use labor market information effectively, see NAB's guide, *Planning, Management and Evaluation: Realizing PIC Potential.*

EGS: Economic Development Linkages

What is Economic Development?

The concept of economic development is viewed in different ways by different people, depending on their interests, needs, and perspectives. Despite various attempts to capture the essence of "economic development" in a definition, the term often remains ambiguous.

The following definitions which highlight the differences among perspectives are options for the PIC to consider:

- Economic development is a process for mobilizing financial, human, and physical community resources toward improving the standard of living for community residents.
- Economic development is the use of public resources to influence private investment thereby stimulating growth through these public incentives—both cash and noncash [National Council for Urban Economic Development].
- Economic development refers to organized planned cooperative efforts between public and private sectors designed to improve the economic conditions of a locality. For CETA purposes, improvement is measured in terms of:
    a. Expansion of existing business or development of new businesses, thus creating new jobs in which CETA-eligible persons could be employed;
    or
    b. Retention of existing businesses, thus preventing the loss of jobs to the local economy. [U.S. Department of Labor, Employment and Training Administration in Field Memorandum No. 243-80, April 29, 1980].
- Economic development is a process which has as its purpose the creation of new and updated jobs to produce goods and services in response to identified markets [working definition of the Lehigh Valley Manpower Program].

These definitions pinpoint several key factors which the PIC should consider when deciding if and how to become involved in economic development:

- Economic development should not be viewed simply as economic growth—but as the *influencing of private investments* through the use of public resources.
- Today, economic development has as much to do with helping small businesses and *keeping existing businesses* in the locality, as with attracting new industry to the area.

The PIC may wish to embrace a broad definition of economic development. However, its impact on the economic development process itself may be enhanced if it (1) clearly defines its *own perspective*, and (2) develops *an operational definition* of economic development based on local economic conditions.

In developing its own operational definition, the PIC may wish to consider the goals of the economic development process:

- Increasing the rate of economic growth
- Targeting economic activity to distressed areas
- Improving the number and quality of jobs
- Targeting of jobs for the economically disadvantaged.

Why is Economic Development Important to the PIC?

The relationship between economic development and employment and training programs is a direct and straightforward one—economic development creates a demand for skilled workers through job creation and PICs can provide resources to train people to satisfy the demand.

Effective economic development activities result in jobs created or retained through:

- Retention of existing businesses
- Revitalization of declining businesses
- Expansion of existing businesses
- Attraction of new businesses.

National policy reflects the importance of the economic development/employment and training linkage through the 1980 revisions to Title VII which provide a 10% incentive bonus to PICs who engage in efforts to promote coordination with economic development activities. It also requires that representatives of local economic development councils be appointed as members of the PIC. Local economic development councils must also be consulted in development of the PIC Annual Plan.

Economic development efforts are usually *locally initiated, managed and operated* and can mean:

- new jobs
- additions to the local tax base
- efficient land use
- diversification of the local economic base
- cushioning an economic loss (such as manufacturing jobs) by bringing in an economic asset (such as service companies with jobs).

The PIC that "hooks up" with economic development efforts can expect to share in the benefits. Resulting benefits may even be multiplied when the PIC links economic development with community and neighborhood development.

Economic development activities can result in expanded employment opportunities targeted for the structurally unemployed. In addition, through economic development activities, the PIC may enhance its image and status as a private sector organization and gain greater respectibility in the business community. The PIC's ability to "leverage" a good deal of private money with a relatively small amount of public money through economic development activities may be quite significant.

Should the PIC Become Involved in Economic Development?

The importance of the connection between employment and training programs and economic development cannot be denied. Some ambivalence does exist among PICs regarding the appropriateness of PIC participation in economic development efforts and the priority it should receive in the PIC operations. In addition, some PICs feel this is an area where they are least assured of short term success. Others see economic development as the area with the greatest potential for genuine payoffs in terms of new jobs and employer involvement.

When making decisions on whether or not it is to become involved in economic development, the PIC should assess its capability to act effectively in the following areas:

- Crossing bureaucratic lines
- Forging links
- Using concepts not yet fully developed or tested.

How Can The PIC Participate in Economic Development?

The PIC has the option of participating in economic development through the following *broad roles:*

- Establishing links and lines of communication
- Marketing to increase awareness of the local economic resources available for training and upgrading the workforce
- Encouraging business (through specific economic development efforts) to relocate, expand, or take advantage of economic development incentives.

After the PIC has decided what role, if any, it wishes to assume in economic development, the PIC must make decisions on the specific ways its' role(s) will be carried out.

Some *options* identified in the law are:

- Representing the needs of industry—both the need for attracting an industry to an area or the need for keeping an industry in the area
- Serving as a way for organized labor to have a role in economic development areas
- Identifying the needs and skills of the local labor force and making suggestions about what type of training could be provided to qualify CETA applicants for potential jobs.

Decisions regarding the types of economic development activities the PIC prefers to participate in should be based upon the following *considerations:*

- PIC capabilities
- Local economic development programs and the participants
- Local business needs
- Local labor market characteristics.

The PIC should plan and design its own activities according to local needs as suggested above. The PIC may wish to use the following conceptual models to link economic development with CETA programs as it develops and designs its activities. These models, developed by the Department of Labor, are characterized by the functions that a local prime sponsor could undertake as part of an economic development activity:

- *The Income Generating Model:* CETA is used to support projects such as cooperatives to produce marketable goods or services.
- *The Infrastructure Model:* CETA is used to develop or establish resources and facilities to enhance local economies, such as developing basic facilities, services, or installations needed for an economic development project; providing a CETA workforce to construct an industrial park, or to refurbish buildings; and providing personnel for the growth and functioning of the project or its organizatons.
- *The Promotional Model:* The availability of CETA services are used as an added incentive for businesses and industries to remain or to locate in an area such as using training to provide CETA-eligible persons with skills needed for the expansion or the retention of local businesses.

- *The Economic Development Intermediary Model:* The CETA Prime Sponsor or the PIC acts as an intermediary among various organizations involved in researching, planning, coordinating and promoting economic development activities, such as providing technical assistance to local governments that are exploring ways to bring more private sector jobs in their area.

Additional options for PIC participation in economic development activities are presented below.

For a more detailed discussion of economic development and specific ways in which the PIC might coordinate with and support economic development activities, see *Job Creation Through Economic Development: Exploring the Role of the Private Industry Council*—a guidebook for PICs to be published by the National Alliance of Business in July, 1981. Contact the NAB Regional Service Office for information.

For specifics on regulations and policy, including allowable expenditures and on publications and resources see *Field Memorandum* No. 243-80, U.S. Department of Labor, Employment and Training Administration, April 29, 1980.

PIC Economic Development Options

The following options are presented for the Private Industry Council to select those activities which will best fit local economic needs and problems:

- Develop programs focusing on economic development and recovery
- Input employment and training goals into overall economic development plans and community economic development strategies
- Develop jointly with other economic development groups a statement of goals and objectives for elected officials
- Involve small and minority businesses in community and economic development planning and implementation
- Survey local economic development activities to gather useful information for prime sponsor/PIC staff
- Jointly market CETA and economic development
- Collect and analyze local labor market data using existing labor market information plus that developed by economic development planning bodies
- Encourage and promote traditional lending institutions to finance job creation in areas of economic distress
- Influence the CETA delivery system to more effectively meet private sector needs as identified by local economic development and community bodies
- Exchange personnel with economic development organizations at the advisory governing board level and for staff training/internship programs
- Jointly staff with economic development personnel new projects suggesting economic development efforts
- Develop formal linkages among various economic development initiatives and programs.

Section 4
Part E

EGS: "Other Supportive Programs"

What Are Some Options for the PIC Under "Other Supportive Programs"?

In addition to Marketing, Labor Market Information and Economic Development Linkages, a variety of activities which are being called "other supportive services and programs" constitute part of the EGS program area. These "other" programs usually support transitions and special assistance for the unemployed worker.

The focus of some of these "Other Supportive Programs" may include but is not limited to: (1) *incentive programs* which offer special benefits to employers who hire CETA-eligibles (such as the Targeted Jobs Tax Credit), and (2) *creating linkages* among existing institutions and groups and the employment and training system.

Many "Other Supportive Programs" have particularly innovative themes. The desired degree of innovation in programs has emerged as an issue in some PICs. How much duplication of Title IIB programs or how much innovation the PIC prefers should be weighed in light of a wide range of variables. Research has not provided any conclusive evidence on how "good" or "bad" innovative programs are. However, findings may be forthcoming as PICs continue the process of testing and demonstrating the effectiveness of both conventional and "innovative" programs.

Most of the employment and training programs described in Section 3 are considered "conventional". The programs and activities discussed in this section lean more toward "innovation". Many of the "Other Supportive Services" options presented below reflect creative use of program funding.

"Other Supportive Programs" Options for the PIC

- *A Transportation project* that overcomes geographic barriers between disadvantaged residents and the job sites
- *A Self-Placement Center* aimed at shortening the time between unemployment and placement through self-help job search methods
- *An Employment Transition Center* where an accurate and speedy match is made between the worker's job skills and the requirements of incoming job orders
- *An Umbrella OJT/Marketing Project* that coordinates the administration and marketing of OJT programs operated through local governments, the JOB Service, the Chambers of Commerce, and community organizations
- *A Computerized Job Match System* to assist in the placement of graduates from high schools, skills centers, and community colleges
- *A Small Business Directory* which lists the current educational and training programs operated by local government/educational/training institutions
- *A Career Guidance Institute* which develops seminars for local guidance counselors and educators that familiarize school personnel with local job opportunities and industry skill requirements
- *A Legislative Affairs Committee* to articulate local business views in the State
- *A Model Site Development Process* to help business comply with regulations related to openings of new industrial sites
- *A Management Assistance Response Team* to help employers with CETA administrative burdens such as paperwork
- *A Child Care Conference* sponsored by the PIC
- *A Day Care Center* in an industrial or in-plant setting.

Section 4 Part F

Strategic Suggestions

Employment Generating Services

In order for the PIC to put Employment Generating Services to work in the most effective manner in its local employment and training environment, it should embrace the following *principles*:

- *Assess PIC needs* and then identify the most appropriate use of EGS funds to assist in the overall PIC strategy.
- *Be creative*—use EGS funds to innovate and expand traditional employment and training efforts.
- *Combine EGS funding with other funding*—look for ways to stretch EGS dollars by cooperating with other community programs which in turn may establish a cooperative/community image for the PIC.
- *Involve all the Players*—make CETA program staff, PIC staff, and staff of the Department of Labor co-partners in the development process of the EGS plans; obtain support from within the community—business, labor and community groups—so that their approval and political support is in place initially.

Marketing

To increase the effectiveness of its marketing effort, the PIC should strive to:

- Complete basic market research for the total PIC market area before the start of the annual planning process
- Include specific marketing and sales objectives in the PIC Annual Plan
- Use time and resources to find out how successful PICs in other areas sell their product line
- Recruit and train sales staff
- Design a marketing/sales management system that will provide PIC leadership with current information on the progress of its marketing/sales activities
- *Be innovative, imaginative, and represent the private sector point of view.*

Labor Market Information

To make the most effective use of labor market information, the PIC should:

- Use the information for decision-making purposes in *concrete* ways that will *influence* the kinds of *program choices*, and
- Seek *new* labor market information which accurately defines *current* private sector needs and problems.

Economic Development Linkages

PICs that feel they have the capacity to become involved in economic development should embrace the current national goal of economic recovery through concerted action in their local community. Their challenge is to offer leadership and direction to the private sector in bringing about *economic recovery through strong PIC/economic development linkages.*

Appendix I.

The National Alliance of Business

The National Alliance of Business (NAB) is an independent, non-profit corporation working in partnership with business, labor, government, education, and community based groups to help solve the unemployment problems of America's disadvantaged youth and adults. NAB's primary mission is to encourage private businesses to provide jobs and job training for the disadvantaged. NAB encourages business leaders to support and participate in local private/public partnership efforts, especially through involvement with their local Private Industry Councils.

The National Alliance of Business is in a unique position to be of service and support to the Private Industry Council and to play an advocacy role for the PIC at the national and local levels. NAB services reach the PICs through its network of eleven Regional Service Offices (see following page). In addition to providing a variety of services and technical assistance to PICs, the Regional Service Offices have direct access to a wide range of specialized information provided through NAB's National Headquarters.

Among the areas of NAB's expertise and services upon which a PIC might wish to draw are:

- PIC Program Development
- PIC Program Information Services

  —*Data Bank* which compiles and disperses a wide range of specialized information for PICs

  —*PSIP Clearinghouse* which compiles and distributes profiles and case studies of PIC activities and programs which are updated monthly
- PIC Training Packages and Technical Assistance
- PIC Marketing Materials
- Policy Analysis and Legislative Informational Services
- A Network of Corporate Relations Liaison Contacts Reaching to the Entire Business Community
- Technical Assistance from Regional Service Offices
- PIC Publications

  —"Showcase"—a bimonthly newsletter highlighting successful PIC programs

  —NAB's Series of *Private Industry Council Guides and Training Handbooks* (see Appendix II).

Appendix I.
Continued

Regional Service Offices

To Be Contacted for Information and Technical Assistance

Regional Vice Presidents

Region I

TIMOTHY ANDERSON
National Alliance of Business
190 High Street, Suite 500
Boston, Massachusetts 02110
Phone: (617) 426-4315

Region III

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Region IV

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Region VI

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Region VII

HENRY L. McHENRY
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Kansas City, Missouri 64105
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Region VIII

DENNIS REZENDES
National Alliance of Business
950 Broadway Building, Suite 100
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Phone: (303) 832-4343

Region IX

ROBERT HALL
National Alliance of Business
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San Francisco, CA 94105
Phone: (415) 391-4061

Region X

RUEBEN FLORES
National Alliance of Business
2200 6th Avenue, Suite 215
Seattle, Washington 98121
Phone: (206) 622-2531

Region XI

THOMAS F. RILEY
National Alliance of Business
Western Reserve Building
1468 West Ninth Street
Cleveland, Ohio 44113
Phone: (216) 566-9955/9006/9007

Technical Assistance Staff

Region II

JAMES M. CEDERDAHL
National Alliance of Business
870 Bergen Avenue
Jersey City, NJ 07306
Phone: (201) 792-4162

NAB LOCAL METROS are located in various sites around the country. Contact your NAB Regional Service Office for the METRO nearest you.

Appendix I.
Continued

National Headquarters

National Alliance of Business
Headquarters
1015 15th Street, N.W.
Washington, D.C. 20005

Executive Personnel

WILLIAM H. KOLBERG
President and Chief Executive Officer

PIERCE A. QUINLAN
Executive Vice President
Operations

CARLETON W. BORDEN
Acting, Executive Vice President
Corporate Relations

ALBERT L. MARK
Senior Vice President
Communications

ELLEN BOYERS
Vice President
Information Services and PSIP Clearinghouse

DONALD E. EDWARDS
Vice President
Personnel and Administrative Services

FRED FREDERICK
Vice President
Training

GEORGE J. SAMUELS
Vice President
General Counsel

ESTHER FRIEDMAN SCHAEFFER
Vice President
Program Development

ROY SIEMILLER
Vice President
Labor Liaison

RALPH SILWARE
Vice President
Finance and Acting
Treasurer

ROOSEVELT TURNER, JR.
Vice President
Field Management

FRED WENTZEL
Vice President
Marketing

MILLICENT W. WOODS
Vice President
Policy and Evaluation

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Appendix III. Glossary of Terms

Autonomy—the quality or state of self-governance, self-control, self-containment, independence from the whole.

Balance of State, BOS—the area outside the boundaries of the CETA prime sponsors in a given state and generally composed of smaller, rural counties under the administration of the state prime sponsor which allocates CETA monies to projects in those areas.

Bureau of Apprenticeship & Training, BAT—the division of the U.S. Department of Labor which works to identify and develop apprenticeable opportunities in business.

Bureau of Labor Statistics, BLS—a division of U.S. Department of Labor which publishes socio-economic data including employment and cost-of-living statistics.

CETA Planning Council—appointed by the Chief Elected Official to advise in overall planning of the employment and training programs under all titles of CETA.

CETA Planning Cycle—the time period in which plans for CETA programs proposed for the next fiscal year (October 1–September 30) are developed and submitted to the Secretary, Department of Labor for approval. Key dates are: May 15–June 1—planning estimates and revisions to regulations issued; July 1—preliminary plan submitted to Department of Labor, Regional Office and community review begins; August 14—review and comment period ends and plan is revised; September 1—final plan submitted.

CETA Prime Sponsor—a state, county, local government or consortium unit acting as administrator of the *Comprehensive Employment and Training Act* funded programs in the designated area.

Community Based Organization, CBO—a private non-profit organization which is representative of the community or a significant element of the community; may provide employment and training services and/or activities.

Comprehensive Employment & Training Act, CETA—an act by Congress "to provide job training and employment opportunities for economically disadvantaged, unemployed or underemployed persons which will result in an increase in their earned income, and to assure that training and other services lead to maximum employment opportunities and enhance self-sufficiency" (Public Law 95-524, Sec. 2).

Comprehensive Employment and Training Plan—a master and annual plan describing the administration and programs under CETA which is developed by the prime sponsor with the participation of the CETA Planning Council and submitted to the Secretary, Department of Labor for approval (Public Law 95-524, Sec. 103).

Economic Development Administration, EDA—division of the U.S. Department of Commerce concerned with promoting, developing, and in some cases financing, regional, state and local public works and other economic development-related projects.

Effectiveness—ability to produce or accomplish a decided, decisive, or desired result.

Employment And Training Administration, ETA—a division of the U.S. Department of Labor, that is the administering agency for CETA programs on a nationwide basis operating through 10 regional offices.

Federal Representative, FR, (fedrep)—individual from a regional U.S. Department of Labor office assigned responsibility for employment and training programs within a defined geographic area.

Field Memorandum, FM—national directive issued by U.S. Department of Labor.

Goal—a statement of an intended result or an end toward which effort is directed through actual operating plans and policies of an organization.

Job Related Education, JRE—refers to the education necessary to enable a worker to assimilate OJT. JRE may include basic remedial education in mathematics and language skills needed to perform job duties. Technical information may also be included.

Mission—the general purpose of the organization as put forth in its charter, governing rules or public statements by key executives.

National Alliance of Business, NAB—a business-led, non profit corporation working in partnership with business, labor, government, education and community groups to reduce unemployment problems of economically disadvantaged youths and adults.

Appendix III.
Continued

Glossary of Terms

National Association of Counties, NACo—national public interest group for the counties which has an active information office for dissemination of county oriented CETA program information.

National Governors Association, NGA—national public interest group for the Governors which has an active information office for dissemination of state-oriented CETA program information.

National League of Cities, NLC—a major lobbying and public interest group for the smaller and medium sized cities and maintains an employment and training information service for its member cities.

National Urban League—an interracial, nonpartisan, non-profit community service organization with over one hundred affiliates using social work, economics, law and other disciplines to secure equal opportunity in all sectors of society for Black Americans and other minorities; may operate job training programs for CETA prime sponsors.

Objectives—a measurable accomplishment necessary to achieve a goal.

PIC (PSIP) Annual Plan—the Title VII subpart to the CETA prime sponsor's Comprehensive Employment and Training Plan which must have concurrence of both the PIC chairperson and Chief Elected Official of the CETA prime sponsor in order to be approved by the Department of Labor. (20 CFR 679.5).

Public/Private Partnership—a formal or informal agreement between these two sectors to define and resolve community problems for their mutual benefit.

Regional Administrator, RA— regional administrative officer of the U.S. Department of Labor. There is one Regional Administrator per federal region.

Service, Employment, Redevelopment, SER—national self-help organization for Spanish speaking persons.

Small Business Administration, SBA—a division of the U.S. Department of Commerce concerned with promoting, developing, and financing small business enterprises.

State Employment Security Agency, SESA—a state administered agency funded through the Department of Labor which offers job service, placement and counseling, provides labor market information, and administers Unemployment Insurance; coordinates other programs such as Job Corp, Work Incentive Training (WIN) and apprenticeship training programs.

Targeted Jobs Demonstration Program, TJDP—Grants from DOL made on a selective basis to units of local government to promote employment opportunities for the economically disadvantaged through funding of economic and community development projects.

Targeted Jobs Tax Credit, TJTC—an elective tax credit that applies to wage costs of eligible employees between January 1, 1979 and December 31, 1981, and is equal to 50% of the first year wages up to $3,000 and 25% of second year wages up to $1,500. Youth, ex-offenders and the economically disadvantaged are eligible, in addition to other groups as determined by the State Employment Service.

To Impact—to bring about a result; to influence; to effect; to produce an outcome traceable to a goal or aim.

U.S. Conference of Mayors, USCM—a major lobbying and public interest group for the nation's larger cities which has an active information office for dissemination of large city oriented CETA Program Information.